



# Director's Station: Hands-On Training + How To's

**Montana Shared Catalog** ([msc@mt.gov](mailto:msc@mt.gov))

Montana State Library

1515 East Sixth Ave., Helen, MT 59620-1800

[http://www.msl.mt.gov/For\\_Librarians/Montana\\_Shared\\_Catalog/default.asp](http://www.msl.mt.gov/For_Librarians/Montana_Shared_Catalog/default.asp)

Directors Station MSC Page

[http://www.msl.mt.gov/For\\_Librarians/Montana\\_Shared\\_Catalog/Director's\\_Station/default.asp](http://www.msl.mt.gov/For_Librarians/Montana_Shared_Catalog/Director's_Station/default.asp)

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Miles City Public Library

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[www.MilesCityPublicLibrary.org/](http://www.MilesCityPublicLibrary.org/)

# Logging in & Dashboard

**Take a moment and enable pop-ups in your browser.**

<http://mscds.mt.gov/directorsstation/default.aspx>

DirectorsStation: DirectorsStation Dashboard - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <http://mscds.mt.gov/directorsstation/default.aspx>

Google sirsi Search 195 blocked Check Autolink Autofill Options sirsi

**SirsiDynix My DirectorsStation Dashboard** Menu

SwiftLinks

SwiftAlerts

YA-FICT - Total Items Checked Out over 50 where MCPL

SwiftAnalysis

All Catalog Measures

Measures

ItemType

	Total Titles	Total Call Numbers	Total Copies	% of Copies to Titles	% of Copies to Call Numbers	% of Copies to Titles
All ItemType	622,842	2,032,729	2,120,068	340.39%	104.30%	326.36%

SwiftHelp

Directors Station Training Center:

- Getting started with DirectorsStation
- Populating My DirectorsStation Dashboard
- Saving, printing, and emailing reports
- Using dimensions, modes, and reset
- Using the calculator
- Filtering by slice option dimensions
- Using lookup to go directly to a data member
- Filtering and sorting data columns
- Displaying titles and OPAC searches
- Creating a chart
- Creating an alert
- Creating a query
- FAQs

SwiftQueries

Which 10 All Station Library - All Station Library had the hig...

10 Rows	Station Library - Station Library	Total Circulation
1	MSLA-MAIN	2,579,648
2	FCL-MAIN	1,152,136
3	BOZEMAN	973,894
4	BITTERROOT	397,841
5	FCL-WF	300,797
6	LPL	245,228
7	FCL-GF	209,939
8	DILLON	124,541
9	MCPL	123,956
10	WHITEHALL	118,600



Takes you to the Dashboard



Organize My Folder



Logout

To access reports, **My Folder**, and support Docs, click on the left SirsiDynix taskbar.



Tip: Password can be changed in **My Profile** located in **My Folder**.

# Creating a Report

## Step-by-Step Current Checkouts Report

*Click on the SirsiDynix left Taskbar.*

**Collection Analysis**

**Public Services** folder

**Circulation**

**All Checkout Measures (Current).**

The selected template will fill the screen. Click on the **left Taskbar** or anywhere on the screen to remove the folder listing.

## **Basic Report Components- Terminology**

### Dimensions

The different variables used to filter a report (located in the green pool on the upper half of the screen).



The screenshot displays a green-themed interface for selecting report dimensions. It features a grid of 24 dropdown menus arranged in 4 rows and 6 columns. The dimensions are as follows:

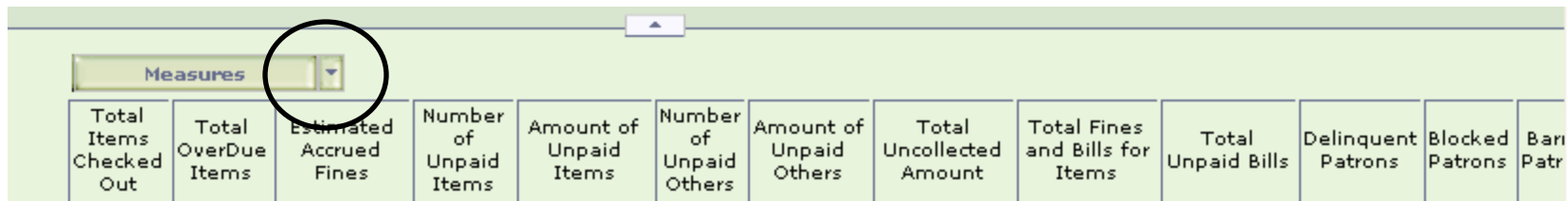
User Profile	User Category 1	User Category 2	User Category 3	User Category 4	User Category 5
User Zipcode	Call Number	Call Type	Item Category 1	Item Category 2	ItemType
Charge Date	Due Date	Checkout Status	Circulation Rule	Language of Title	Country of Pub
Current Location	Home Location	Item Price	Year Published		

Below the grid is a small upward-pointing arrow button.

# Creating a Report—Continued

## Measures

The output of the report. Once Dimensions are set, select Measures to limit output. To change your measures, click on the dropdown arrow next to Measures and select or de-select the options you want.



**Dimensions** in the Active Report area.

A screenshot of the report interface. The 'Dimensions' section is on the left, showing a list of dimensions: User Category 1, User Category 2, User Category 3, Call Type, Item Category 1, Item Category 2, Checkout Status, Circulation Rule, Language of Title, Item Price, and Year Published. The 'Measures' section is on the right, showing a list of measures: Total Items Checked Out, Total OverDue Items, and Estimated Accrued Fines. The 'Library' dropdown is set to 'MSLA-MAIN'. The 'User Profile' dropdown is set to 'All User Profile Total'. The data table shows the following values:

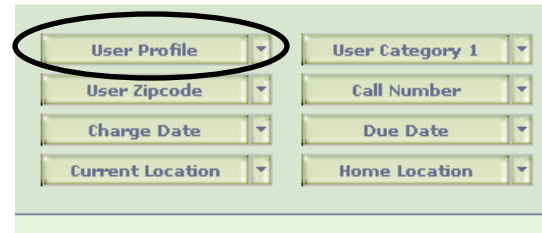
Library	Total Items Checked Out	Total OverDue Items
MSLA-MAIN	40,203	5,905
MSLAG-ADU	30,931	3,863
MSLAG-JUV	5,044	1,037
MSLAG-STAF	1,169	119
MSLAG-STU	1,081	192
MSLAG-TEMP	966	582
MSLAG-VOL	301	13
ILL-NOBILL	272	37
MSLAG-GRP	122	1

Data displayed dynamically as you adjust **Dimensions** and **Measures**.

## Creating a Report—Continued

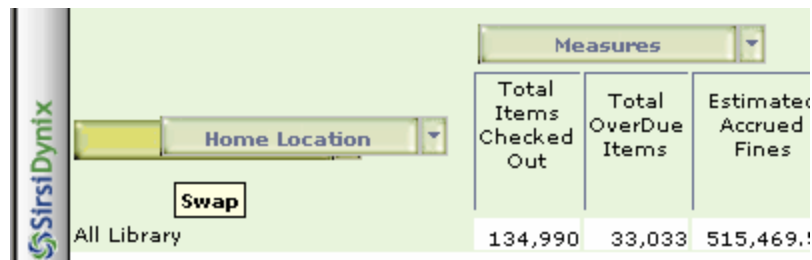
Move the **Dimension** buttons by left-clicking and dragging on the whole button (aim for the words)

As long as you do not release the left mouse button, you can move the **Dimension**.



**Dimensions** can be moved from the green pool above to the Active Report area below.

Wait until the word **Swap** appears



Select the **Home Location** dimension from the green pool above.

Drag the **Home Location** down to where **Library** is displayed in the Active Report area.

Hover over **Library** until the word “Swap” appears. Once this appears, then release. The **Home Location** will replace the **Library** button and the **Library** button returns to the Dimensions pool.

# Creating a Report—Continued



Tip: Setting **Dimensions** from the pool can be very effective, as it presents a cleaner-looking report, however, you can only choose ONE option from the list if you leave the **Dimension** in the pool.

To Set **Dimensions** in the Pool  
Select your library by clicking on the down arrow next to **Library**. After selecting, click on **Accept** to lock-in the selection.

The report below will automatically adjust to your new settings.

Montana Shared Catalog

All Checkout Measures (Current)

Library:

Library List:

- ☐ LAUREL
- ☐ LIMA
- ☐ LPL
- ☐ MADISON
- ☐ MCC
- ☒ MCPL
- ☐ MEAGHER
- ☐ MISSION
- ☐ MSL
- ☐ MSLAINTL
- ☐ MSLA-MAIN
- ☐ MSLA-SL
- ☐ MSLA-SV
- ☐ MT-ACAD
- ☐ MT-BIBLE
- ☐ MT-PSG

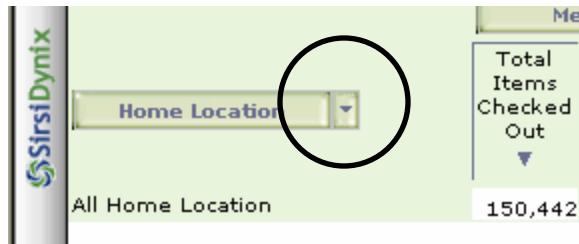
Report Table:

Library	Number of Unpaid Items	Amount of Unpaid Items	Number of Unpaid Others	Amount of Unpaid Others	Total Unco Arr
MCPL	509,755	503,404.23	54,501	92,281.61	107,187.84

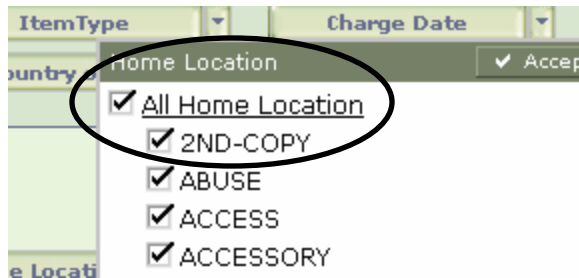


Tip: You can set ONE option in as many different **Dimensions** in the above pool as you want.

## Creating a Report—Continued

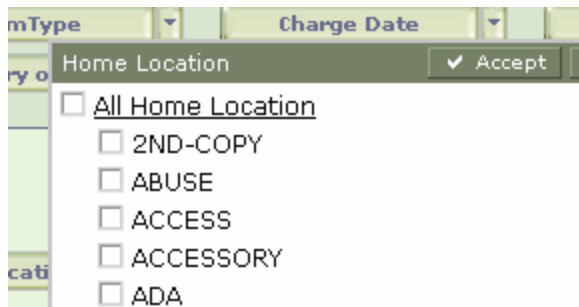


To Set Dimensions in the **Active Report area**  
Click on the down arrow next to **Home Location** below to change the location options. Once finished, click on **Accept**.



### Limit **Dimensions** the Easy Way

After clicking the down arrow click on the ALL underlined heading with your hand. This will minimize the list.

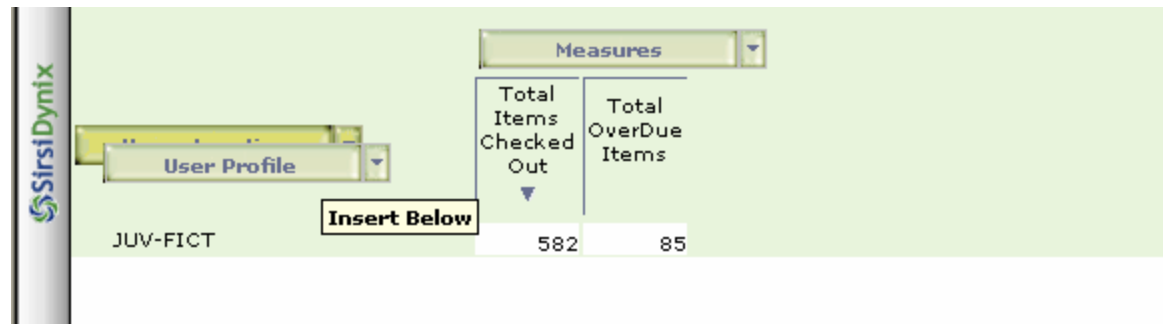


Remove the check and then click on the ALL underlined heading with your hand one more time. The list will expand with all of the checks removed. Now check what you want.

# Creating a Report—Continued

## Piling Dimensions

Select the **User Profile** button from the **Dimensions Pool** and drag down to Dimensions list at the bottom left. Hovering over the **Home Location** button, you can choose to “Insert Above”, “Insert Below” or “Swap”.



You can drag down more Dimension options from the Pool above and add them to the tiered list.

To keep your report cleaner, set **Dimensions** from the pool above (like the **Library** button earlier). To cancel **Dimensions** set in the pool, open the dimension, place the dot in the “ALL” at the top, click **Accept**.



## Creating a Report—Continued

Home Location

Measures

User Profile

	Total Items Checked Out	Total OverDue Items	Estimated Accrued Fines	Number of Unpaid Items	Amount of Unpaid Items	Number of Unpaid Others	Amount of Unpaid Others	Total Uncollected Amount	Total Fines and Bills for Items	Total Unpaid Bills
FICTION										
All User Profile Total	375	71	239.10	2,785	300.90	0	.00	540.00	540.00	300.90
ILL	18	9	11.90	250	.70	0	.00	12.60	12.60	.70
MCC-STU	2	2	10.00					10.00	10.00	
MCPL-ADU	305	42	143.90	2,049	237.20	0	.00	381.10	381.10	237.20
MCPL-JUVN	1	1	4.00	36	.70	0	.00	4.70	4.70	.70
MCPL-JUVY	15	10	39.30	113	44.30	0	.00	83.60	83.60	44.30
MCPL-NCJUY	1	0	0.00					0.00	0.00	
MCPL-STAFF	4	1	0.00	10	.00	0	.00	0.00	0.00	.00
MCPL-STUDO	2	2	10.00	11	1.20	0	.00	11.20	11.20	1.20
MCPL-TCHO	14	0	0.00	227	4.70	0	.00	4.70	4.70	4.70
MCPL-TEMP	4	4	20.00	7	12.10	0	.00	32.10	32.10	12.10
REPAIR	9	0	0.00					0.00	0.00	
JUV-FICT										
All User Profile	402	64	145.80	3,931	647.25	0	.00	793.05	793.05	647.25
MONTANA										
All User Profile	14	6	15.40	112	6.40	0	.00	21.80	21.80	6.40

Sirsi Dymix

?

Clicking on the underlined All User Profile will expand the **Dimension** into your library's user profile list, with current statistics for each profile. Any underlined item can be expanded further this way.

# Creating a Report—Continued

## Total Line

The total line (in bold going along the top of the report data) can be omitted or added.

Click on the down arrow next to the dimension you want. Remove (or add) the check from the top underlined “ALL” box.

Total Items Checked Out	Total OverDue Items	Estimated Accrued Fines	Number of Unpaid Items	Amount of Unpaid Items	Number of Unpaid Items
52.85	14,220	3,160.23	1,		
21.00	922	1.40			
07.00					
14.20	8,149	1,596.15			
54.50	703	279.50			

The top box will be empty but will turn green. Click **Accept** to close the **Dimension** box.

Items Checked Out	OverDue Items	User Profile
522		All User Profile
342		ACAD-STAFF
140		ACAD-STU
42		AD-DISPLAY
		ADMIN

## Creating a Report—Continued

The screenshot shows the SirsiDynix report creation interface. On the left, a vertical sidebar contains the SirsiDynix logo and icons for a folder, a question mark, and a key. The main area displays a hierarchical selection tree with the following components:

- FY July June** (dropdown menu)
- User Library** (dropdown menu)
- User Category 1** (dropdown menu)
- 2006** (text label)
- MCPL** (text label)
- RES-CITY** (text label)
- RES-CO** (text label)

On the right, a **Measures** dialog box is open, featuring a title bar with "Measures", "Accept", and "Cancel" buttons. The dialog contains a list of measures with checkboxes:

- ☒ **All**
- ☒ **Total Circulation**
- ☐ **Percent of Circulation**
- ☒ **Checkout Item**
- ☐ **Checkout Reserve**
- ☒ **Staff Renewals**
- ☒ **Patron Renewals**
- ☐ **Change Vs. Previous Year FY Jan Dec**
- ☐ **Change Vs. Previous Year FY April March**
- ☐ **Change Vs. Previous Year FY July June**
- ☐ **Change Vs. Previous Year FY Oct Sep**

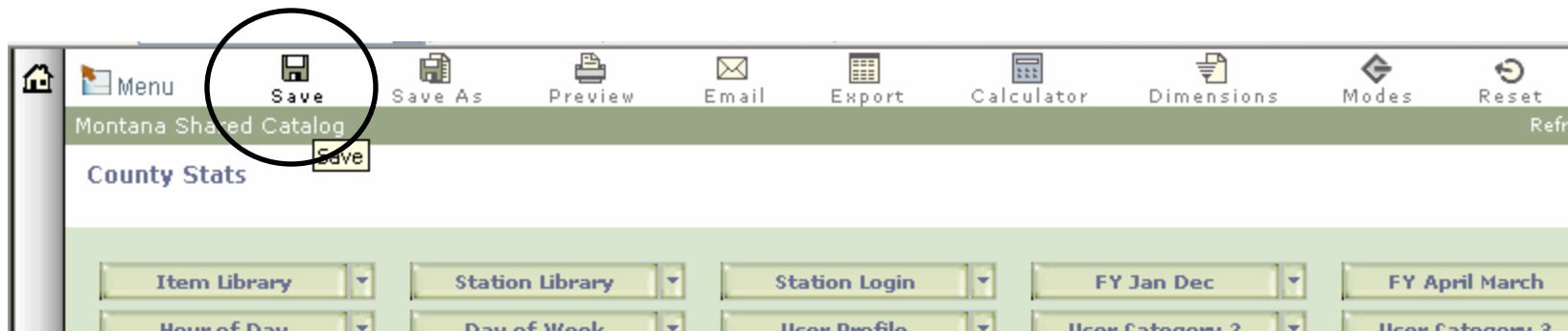
### Setting Measures

Remove extra measures from your report to clean up the appearance of the statistics. Click on the down arrow on the **Measures** button. Select or de-select your measures. Click on **Accept**.

# Saving Your Reports

## Saving Reports

All saved reports are kept in **My Folder**, accessible from the **left taskbar**. Click on the **Save** button at the top of the screen. The **Save As** dialog box appears (see below).

A screenshot of a 'Save As' dialog box. It has a title bar with 'Save As' and buttons for 'Accept' and 'Cancel'. The dialog contains three fields: 'Report Name:' with a text box containing 'County Stats', 'Save in Folder:' with a dropdown menu showing 'My Folder', and 'Add to SwiftLinks:' with a dropdown menu showing 'Yes'.

### Tip: Rename Report

Take a moment to give your report a unique name in the **Report Name** box. Click **Accept**.

### Add to SwiftLinks:

This option makes the report visible in the Dashboard

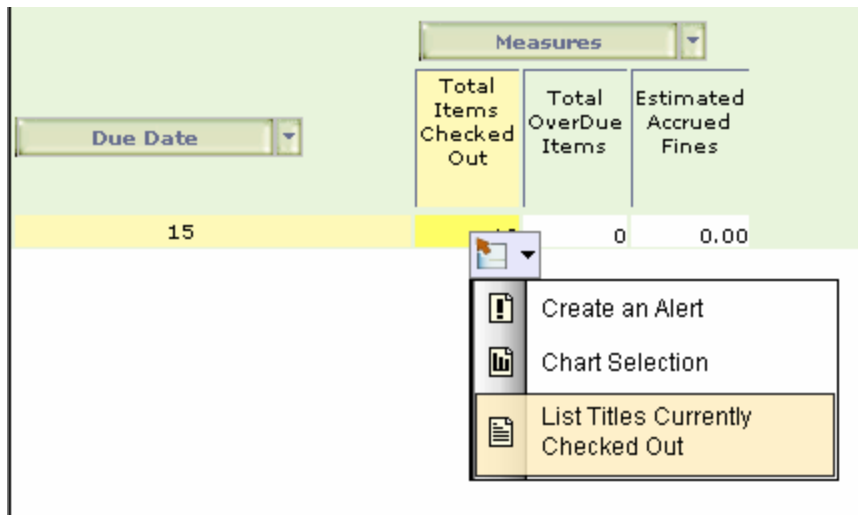
# Using the List Titles Function

## How to List Titles

Now that your report is complete, you can get a list of titles pertaining to your report.

Example: Current Checkouts Report, narrowed by **Library** in the dimensions pool, and a specific **Due Date** selected, September 15, 2006.

Once the report is set, highlight the statistic you would like a title list from. A drop down menu appears, click on **List Titles**.



Due Date	Total Items Checked Out	Total OverDue Items	Estimated Accrued Fines
15		0	0.00

- Create an Alert
- Chart Selection
- List Titles Currently Checked Out

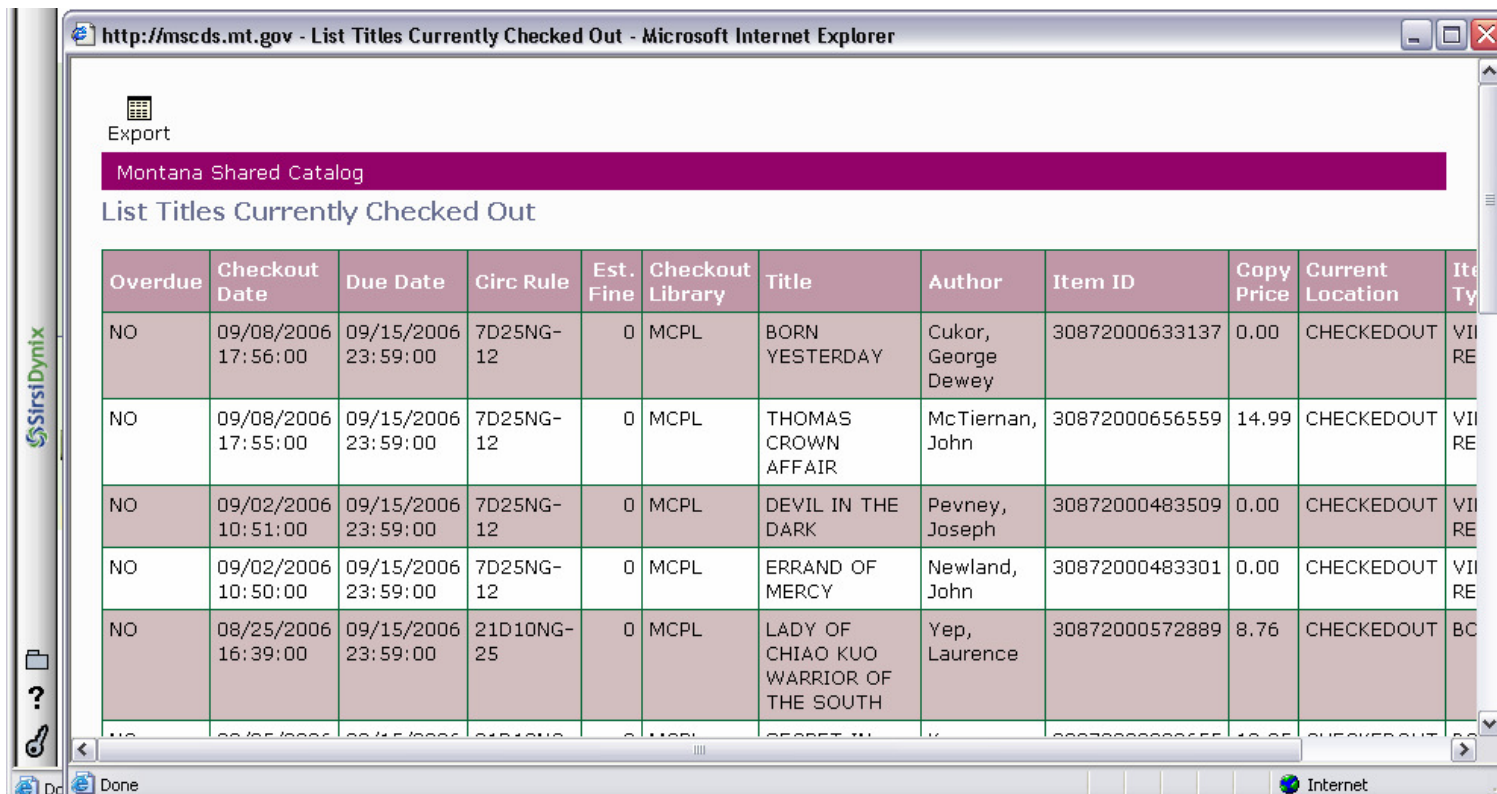


Tip: The List Titles function can list up to 1,000 titles in the formatted boxes, exporting to Excel will show the complete list beyond 1,000.

# Using the List Titles Function—Continued

## The Title List—Formatting

After clicking on **List Titles** the Title List will appear in a different Internet Explorer window.



Export

Montana Shared Catalog

List Titles Currently Checked Out

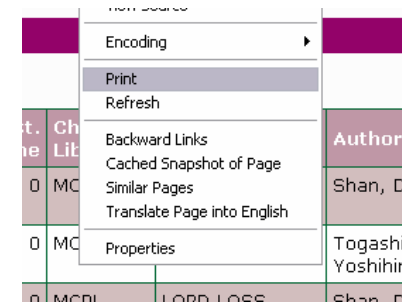
Overdue	Checkout Date	Due Date	Circ Rule	Est. Fine	Checkout Library	Title	Author	Item ID	Copy Price	Current Location	Item Type
NO	09/08/2006 17:56:00	09/15/2006 23:59:00	7D25NG-12	0	MCPL	BORN YESTERDAY	Cukor, George Dewey	30872000633137	0.00	CHECKEDOUT	VII RE
NO	09/08/2006 17:55:00	09/15/2006 23:59:00	7D25NG-12	0	MCPL	THOMAS CROWN AFFAIR	McTiernan, John	30872000656559	14.99	CHECKEDOUT	VII RE
NO	09/02/2006 10:51:00	09/15/2006 23:59:00	7D25NG-12	0	MCPL	DEVIL IN THE DARK	Pevney, Joseph	30872000483509	0.00	CHECKEDOUT	VII RE
NO	09/02/2006 10:50:00	09/15/2006 23:59:00	7D25NG-12	0	MCPL	ERRAND OF MERCY	Newland, John	30872000483301	0.00	CHECKEDOUT	VII RE
NO	08/25/2006 16:39:00	09/15/2006 23:59:00	21D10NG-25	0	MCPL	LADY OF CHIAO KUO WARRIOR OF THE SOUTH	Yep, Laurence	30872000572889	8.76	CHECKEDOUT	BC

# Using the List Titles Function—Continued

## The Title List—Formatting

At this point you have some options:

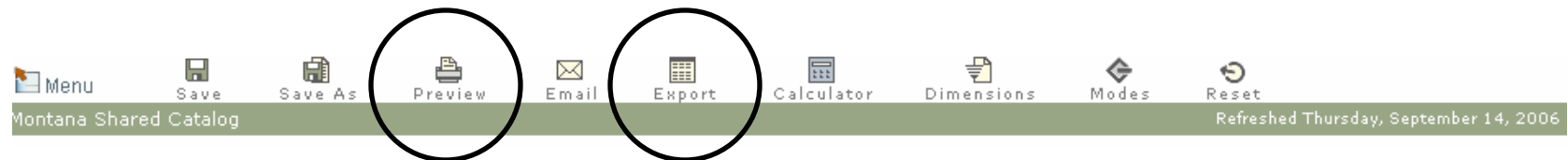
1. To Export the list into Microsoft Excel, click on **Export**.
2. If you want to leave it in the nice format, right click in the middle of the page and select **Print** (make sure to adjust your printer page orientation to accommodate the format of the list). You can also right click in the middle of the page and choose **Select All**, then **Paste** the information into a blank Word document and manipulate and **Print**.



# Exporting & Printing Report Data

## Exporting to Excel

Click on the **Export** button at the top of the screen



At this point you can **Open** the file, and then **Save** it to your computer for further use. Opening brings up Microsoft Excel with your data in a spreadsheet.

## Printing Directly from Director's Station

Click on the **Preview** button on the top of the screen. The statistics appear in a new Internet Explorer window. Click on **Print**. Before you can send the report to your printer, a popup reminds you of the paper orientation.

From the Preview window you can:

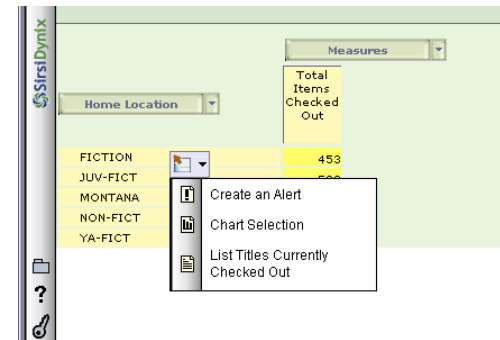
- \* Assign Page Breaks
- \* Change paper size (based on your printing options)



# Creating Attractive Charts & Graphs

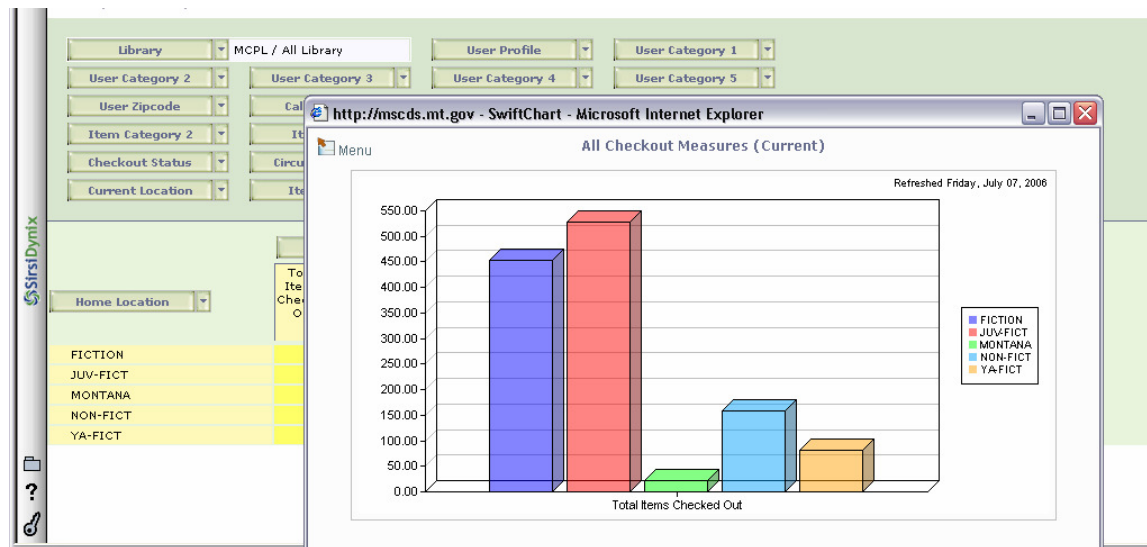
## Selecting Stats to Display in a Chart or Graph

Generate a report; use your cursor to highlight the statistics you want converted into a graph/chart by clicking in the bottom right hand corner of the number you want and dragging upwards towards the left. The boxes change to a yellow color.



Once the area is highlighted a drop down menu appears. From this menu, click on **Chart Selection**.

A bar graph or chart automatically appears in a new Internet Explorer window.

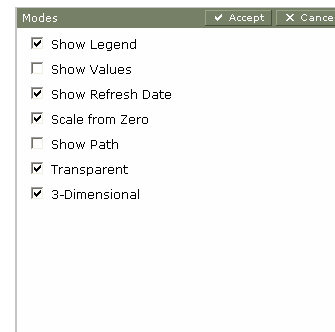


# Creating Attractive Charts & Graphs—Continued

## Manipulating Your Charts & Graphs

Your graph/chart can be manipulated in the following ways:

1. To change the appearance of your graph (pie, line, 3D, etc.) click on **Menu** and select **Chart Types**. After clicking on the chart type you want, the new chart appears in the window.
2. To change the size of your graph/chart, maximize the Internet Explorer window. Click and drag on the top/bottom or left/right sides of the graph/chart square. The chart or graph can also be shrunk in this fashion.
3. To change the appearance of the bar graph, click on **Menu** in the upper left hand corner. Select **Modes**. This allows you to change some of the settings in your graph.



# Creating Attractive Charts & Graphs—Continued

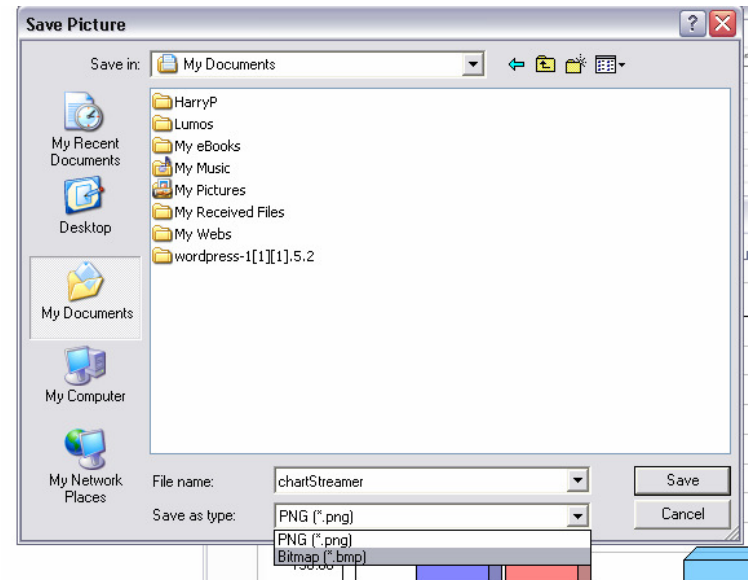
## Saving & Printing Graphs/Charts

To **SAVE** the bar graph and insert it into Word, Excel or Publisher documents, right click in the middle of the graph and choose **Save Picture As**. Save it as a bitmap (\*.bmp).

## Using Graphics in Word

Open up a Word Document, add a title and any other information at the top.

Click on **Insert** at the top. Select **Picture** and then **From File**. Locate your file and click **OK**. The picture will appear in your Word Document.

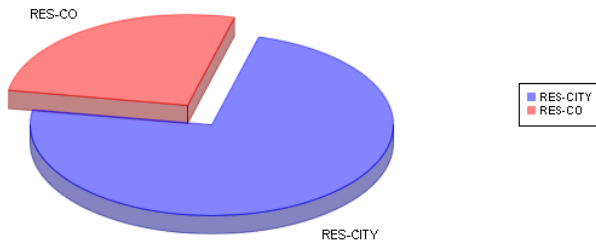


# Finalizing Graph & Chart Labels

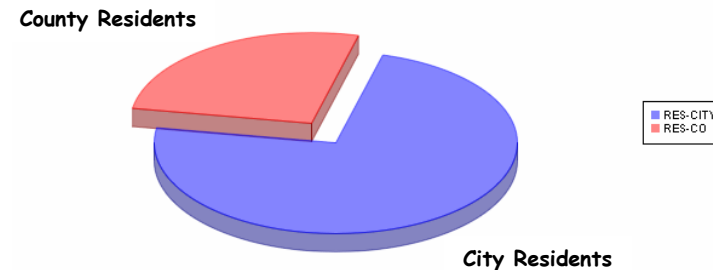
## Modifying Graph/Chart Labels for Clarity

Labels are based on cataloging settings. To create more user-friendly labels, insert text boxes into your Word Documents (make sure to have the settings FILL to the color white, and NO LINE) and type in the text/labels you want, then place the text boxes over the labels embedded into the charts.

**Original Pie Chart**



**Modified Pie Chart**



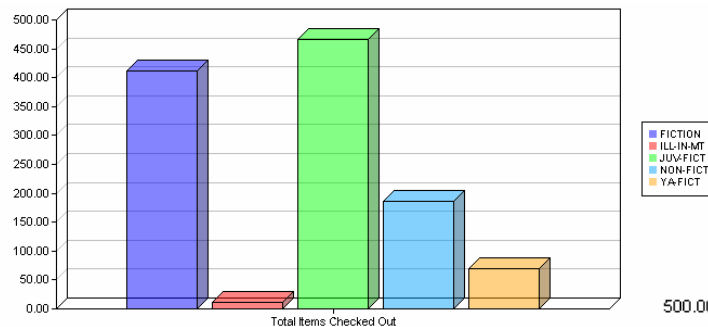
Tip: Increase the font size for your labels for easier reading and clarity. “City Residents” as a label makes better sense than RES-CITY.

# Finalizing Graph & Chart Labels

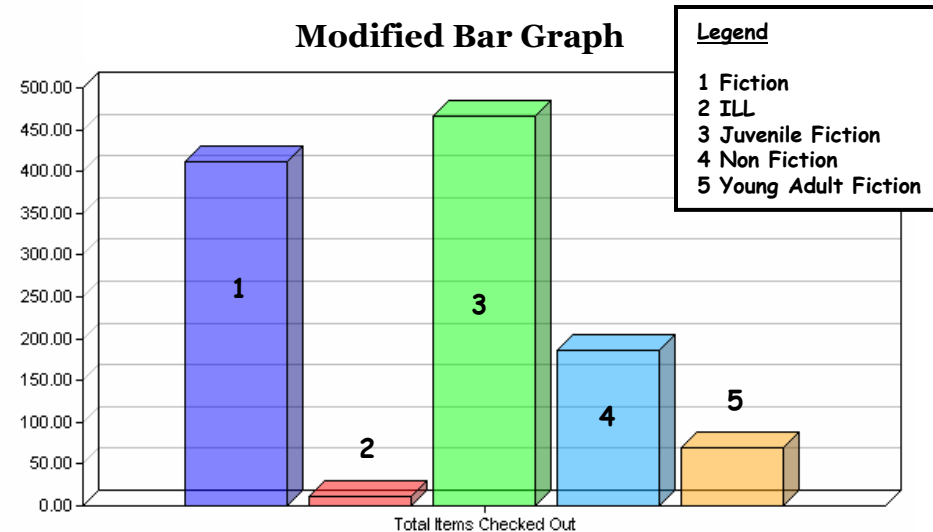
## Modifying Graph/Chart Labels for Clarity—Cont.

Try creating your own Legend to clarify labels for your audience. Insert numbers on top of the stat columns or pie sections corresponding to the Legend.

**Original Bar Graph**

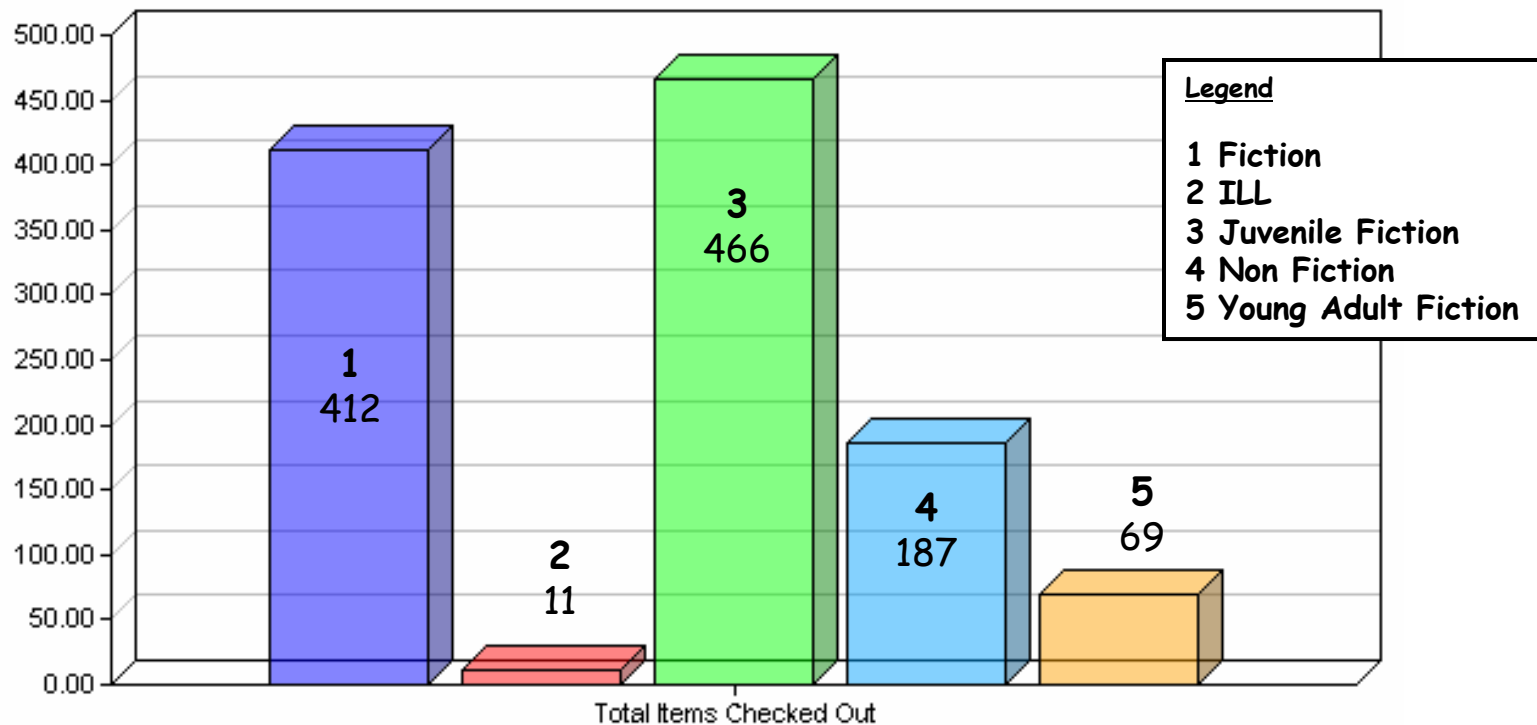


**Modified Bar Graph**



## Miles City Public Library—Current Checkouts

September 17<sup>th</sup>, 2008



Tip: Add your statistics numbers right to your bar graph or pie chart. Or try adding a percentage number and real world language, which helps when explaining your graphs to folks outside of Library services.

# Sources & Thanks

## Sources

All screen shots are from SirsiDynix Directors Station software, build 3.8.7.1  
TM2004-2006, associated training manual and upgrade release notes. Questions  
about this training may be addressed to the instructor.



Montana Shared Catalog

<http://montanalibraries.org/MSCLNmsc-home.htm>

SirsiDynix

<http://www.sirsidynix.com>